



HubSpot Jira Integration: Manage your HubSpot Data in Jira Like a Pro

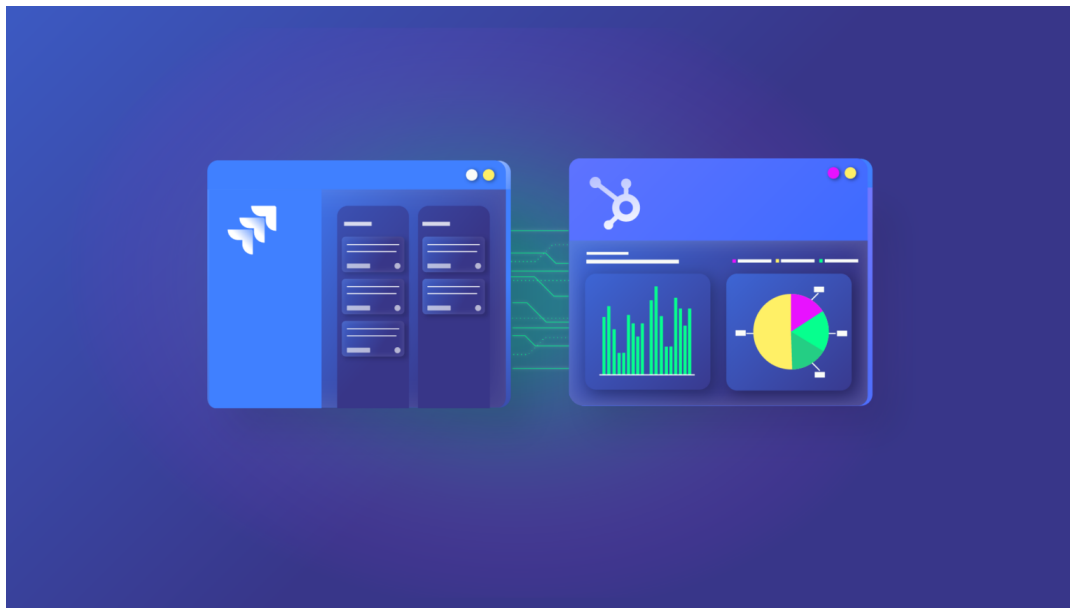


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This article was written by Celina Kuziemko from [Appsvio](#).

HubSpot is one of the most popular and intuitive CRM platforms. It powers customer support, sales, marketing, and other teams by using customer data. You can simply examine the data you need for automated reporting on sales activity, productivity, and salesperson performance.

Now imagine it in combination with Jira, one of the best project management tools used by different teams. Yes, it's time for a HubSpot Jira integration.

Here's what we're going to cover in this blog post:

- [How to Boost your CRM with HubSpot Jira Integration](#)
- [How to Set up a HubSpot Jira Integration](#)
- [HubSpot Jira Integration Common Use Cases](#)

How to Boost your CRM with a HubSpot Jira Integration

HubSpot Jira integration is all about speeding up the ticket service and Support Team's daily work. Teams using HubSpot and Jira separately had to hop between tabs to check out clients' deals, contact data, etc.

It's a challenge for marketing, sales, and support teams to manage data correctly and in order and find the data you need right away and not doing it manually back and forth (like asking or looking around for some customer's data).

Imagine a situation where the Support Team works with Jira and HubSpot, toggling between the two. And there are new tickets from customers waiting to be resolved.

First, you need to check who the customer is, which company that is, what deals you have with them, and how you can contact them.

You simply waste your time going back and forth between Jira and HubSpot looking for information you already have.

Wouldn't it be more convenient to have all the data you need in Issue view? It would simplify data management and please your customers with fewer questions and faster service.

There are some significant benefits for a HubSpot Jira integration that are worth mentioning before we move to setting up the integration:

The service agent doesn't lose context.

Service representatives can avoid hopping back and forth between Jira and HubSpot to look up information about the client who is filing the problem. Furthermore, they would need to check this information in available reports on the Vendor profile without integrating data from Atlassian Marketplace with HubSpot. Only some agents have access to do so.

Additionally, product owners can benefit from customer data. Additionally, they typically do not have access to the Marketplace.

The customer doesn't feel overwhelmed by the number of questions.

On the issue view, you have immediate access to all the customer-related data you require. By doing this, you may avoid adding a dozen or more fields to the request form that would question the client about the apps or hosting they use. The agent is under no obligation to converse with the requester and inquire about licensing concerns. The service representative is totally committed to assisting the reporter and resolving the issue.

You have access to data from HubSpot.

Each team member has access to data in HubSpot. The Jira administrator chooses which values are displayed on the issue for security concerns. As a result, no one will need to be given access to HubSpot.

Agents also don't need to bombard the sales team members who have access to HubSpot because they already have access to all the data they require. It's important to note that the integration functions whether the business employs a free or premium HubSpot license.

As you can see, it's not overstated to say that a HubSpot Jira integration means a single source of truth for customers' data.

Thousands of contacts, data, and deals can be automatically displayed in one tool (Jira). Tickets can be solved faster by giving your teams easy access to the data they need.

You can set up a Hubspot Jira integration with apps available on the Atlassian Marketplace. Depending on whether you need to use HubSpot or Jira more, choose the one that suits you.

In this article, we focus on an app that supports Jira.

Note: *If you use Salesforce as your CRM, you might need a two-way [Jira Salesforce Integration](#).*

How to Set up a HubSpot Jira Integration

One of the apps you can find on the Atlassian Marketplace is [Hubspot CRM Integration for Jira](#) by [Appsvio](#).

It fills the gap of missing integration for companies that use both tools: Jira Cloud and HubSpot CRM.

This tool is dedicated to teams that use Jira at first and then HubSpot because integration is done in Jira views. This integration works for free and paid HubSpot accounts. So let's check how it can help boost your CRM.

The integration lets you view rich customer data within Jira Cloud issues without switching between tools.

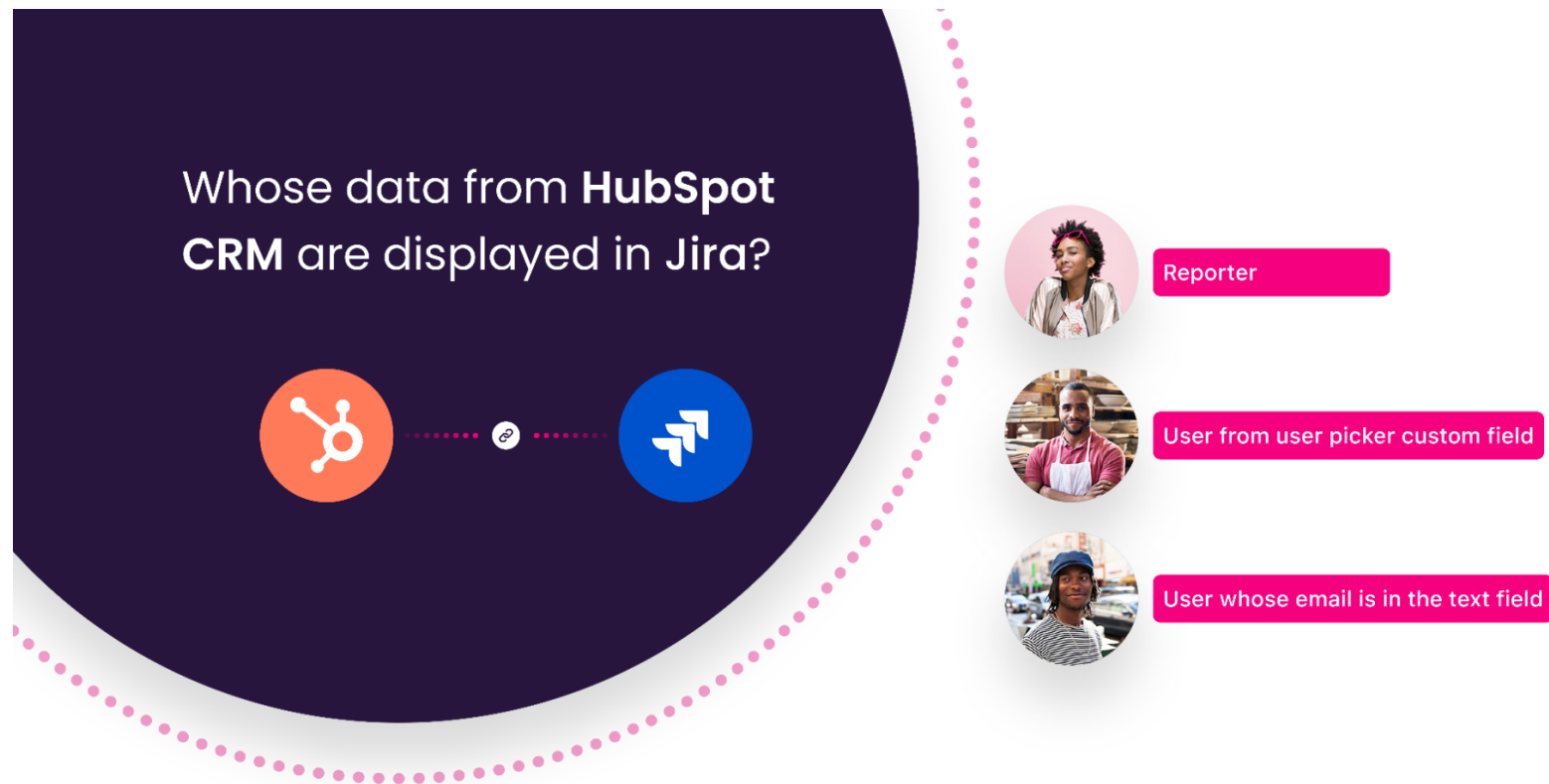
Users can choose HubSpot properties to display on the issue view. All groups from Hubspot are available to select. It is possible to view the reporter's properties from the following objects:

- Contact
- Company
- Deals

The screenshot displays the Jira HubSpot CRM Integration configuration interface. The left sidebar shows the 'Apps' section with 'HubSpot CRM Integr...' highlighted. The main content area is titled 'HubSpot CRM Integration' and features a 'Disconnect' button. Below the title, there are tabs for 'Contact', 'Company', and 'Deals', with 'Company' selected. A 'Filter fields' input and a 'Show in issue glance' toggle are visible. The main area lists various HubSpot properties grouped by object: company_activity, deal_information, sales_properties, and companyinformation. A list of properties is shown with checkboxes for selection. Selected properties include City, Company name, Description, HubSpot Owner Name, Pipeline, and Postal Code. Other properties like About Us, All owner ids, Business units, and many others are listed but not selected.

Users can customize and choose which properties should be displayed on the Issue View. As you can see, plenty of them and every single one existing in HubSpot can be added to Jira. Deals Type, revenue, activity, content, email, .etc.

It is also possible to choose another user whose data is displayed. Not only the reporter's data can be used, but also the person in whatever user picker field with email in a textbox can (it all depends on the configuration the user needs).



HubSpot CRM for Jira provides 2 custom fields: **single** and **multi-select type**.

The user defines which object it should display: Deal, Contact, or Company. After adding the field to the view, it is possible to mark that the specific ticket refers to a particular company.

The objects are linked with the HubSpot object right away on the issue view, so it's easy to find it in the CRM system.

What's more, thanks to the fact that it is a custom field, it's possible to use this data in the issue navigator, quickly search for requests, create filters, and later show them in fields on the dashboard.

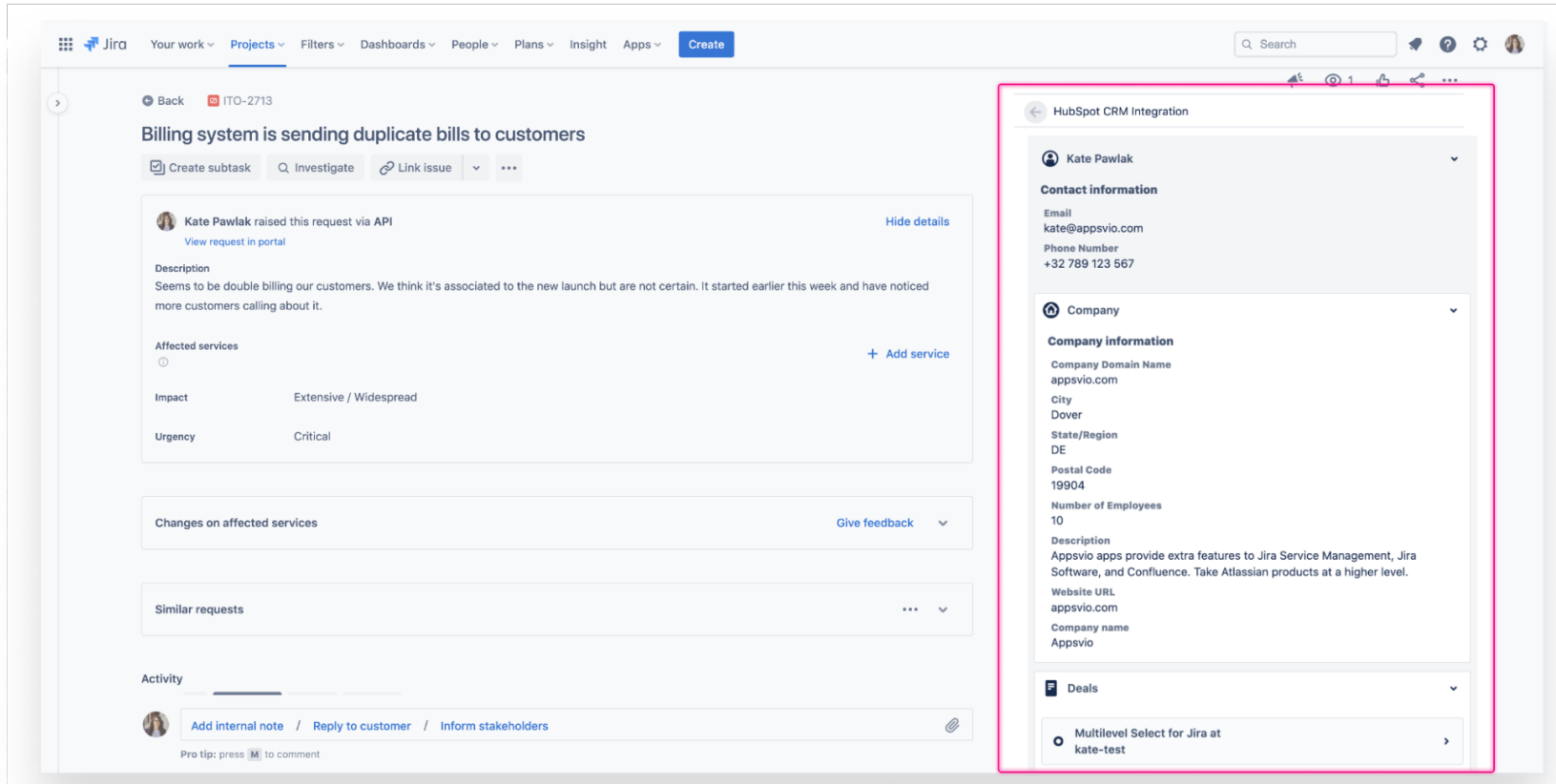
The screenshot below displays all support tickets that have the HubSpot Company field filled in. This way, we can easily make some boards with statistics.

The screenshot shows two overlapping Jira interface windows. The left window, titled 'My board', displays a filter for 'HubSpot company' and a list of tickets. The right window, titled 'All open', shows a list of 33 tickets with the 'HubSpot company' field highlighted in a pink box. The table below represents the data shown in the 'All open' view.

T	Key	Summary	Reporter	Status	Created	HubSpot company	Time to first response
	DESK-17	Triaging requests into queues	iman.bridges@gohero.io	WAITING FOR SUPPORT	27/Jul/22	gohero.io	28 Jul 01:38 PM
	DESK-4	Collecting custom request details	joyce.dodson@mars.com	WAITING FOR APPROVAL	19/Jul/22	Mars	20 Jul 09:00 AM
	DESK-2	Capturing customer email requests	ben.herrera@ingtes.com	WAITING FOR SUPPORT	19/Jul/22	INGTES	19 Jul 08:31 AM
	DESK-7	Automatically update linked requests	nikolas.cantu@neunag.com	WAITING FOR CUSTOMER	19/Jul/22	Neunag	Today 09:12 AM
	DESK-1	What is a request?	Marlin	WAITING FOR SUPPORT	19/Jul/22	saarvik.org	20 Jul 09:00 AM
	DESK-3	Agents & customers	caleb.moore@atlassian.com	WAITING FOR SUPPORT	19/Jul/22	Atlassian	20 Jul 09:00 AM
	DESK-19	Track & improve your team's performance	nimrah.fry@gartner.com	PENDING	27/Jul/22	Gartner	28 Jul 02:10 PM
	DESK-6	Linking requests to a Jira Software issue	Susan McDonald	WAITING FOR SUPPORT	19/Jul/22	PayPal	20 Jul 09:00 AM
	DESK-21	I need help connecting my laptop to the level 3 printer	Franciska	WAITING FOR SUPPORT	11/Aug/22	Appvivo	12 Aug 02:35 PM

The properties are displayed right in the issue view. But what if data in properties has changed?

When the data is altered in HubSpot, for example, when a contact person is replaced or changes last name due to marriage or when a client has a new phone number, it will automatically update in the Jira issue view. So what's happening in HubSpot reflects in Jira.



The screenshot displays a Jira issue titled "Billing system is sending duplicate bills to customers" (ITD-2713). The issue is created by Kate Pawlak. The description states: "Seems to be double billing our customers. We think it's associated to the new launch but are not certain. It started earlier this week and have noticed more customers calling about it." The affected services table shows an impact of "Extensive / Widespread" and an urgency of "Critical".

On the right side, the HubSpot CRM Integration panel is highlighted with a pink border. It displays the following information:

- Contact information**
 - Email: kate@appsvio.com
 - Phone Number: +32 789 123 567
- Company information**
 - Company Domain Name: appsvio.com
 - City: Dover
 - State/Region: DE
 - Postal Code: 19904
 - Number of Employees: 10
 - Description: Appsvio apps provide extra features to Jira Service Management, Jira Software, and Confluence. Take Atlassian products at a higher level.
 - Website URL: appsvio.com
 - Company name: Appsvio
- Deals**
 - Multilevel Select for Jira at: kate-test

All HubSpot contacts are matched to Jira users and customers via their email addresses. As a result, you can see information about the reporter in all types of projects: business (from Jira Work Management), software (from Jira Software), and service (from Jira Service Management).

Project types supported by HubSpot CRM Integration for Jira

-  service projects ⚡ Jira Service Management
-  business projects ⚡ Jira Work Management
-  software projects ⚡ Jira Software

HubSpot Jira Integration Common Use Cases

Optimizing Support Service

One of the typical use cases is actually the case of the app developers themselves which led to the birth of HubSpot CRM Integration for Jira.

[Appsvio](#) deployed a CRM after forming their business and they went for HubSpot CRM. In addition, they use Jira Service Management's support channel for communicating with customers. Obviously, they needed to switch between the 2 platforms all the time.

For instance, a customer would have a query about licensing an app without mentioning it specifically in the ticket. So the team had to copy the customer's email, sign into HubSpot, and check his information there, including details regarding the product he had purchased.

Appsvio initially entered all the information of their clients, both potential and current, manually. Obviously, checking for changes required a lot of effort and regular attention.

After reading the reports, they copied the data from the Vendor profile on the Atlassian Marketplace. Each license, whether evaluation-only or commercial, is designated as a Deal in HubSpot.

To maintain order, they made a new properties group that gathered information from the Marketplace, such as App, Hosting type, Maintenance window, and License size. Getting Atlassian Marketplace and HubSpot CRM to synchronize was too much manual work and Appsvio wanted to display this data on Jira problems. But that presented one additional issue.

That's how the app was born. Creating a HubSpot Jira integration app allowed them to improve support experience directly, impacting customer experience indirectly as well.

Improving Processes

The other case is a story of 2 employees working in different teams. Only one has access to HubSpot due to license limitations.

Kate is a service agent, and she receives a ticket for a customer about an app license. The customer hasn't mentioned which application he is referring to. So Kate has to ask the Sales team for help because she doesn't have access to HubSpot. It takes 3 emails to find somebody who can help and to get an answer.

The image shows a Jira ticket on the left and a WhatsApp chat on the right. The Jira ticket, titled "Question about pricing", was raised by Veronica Northcott. The description asks for help with app licensing. An internal note from Kate Pawlak, dated November 30, 2022, at 10:03 AM, states: "Oh, I have no idea what product the customer is asking about. She left the Appsvio apps field empty. I need to write to Mary who has access to HubSpot." The WhatsApp chat, with Mary Smith as the contact, shows the following messages:

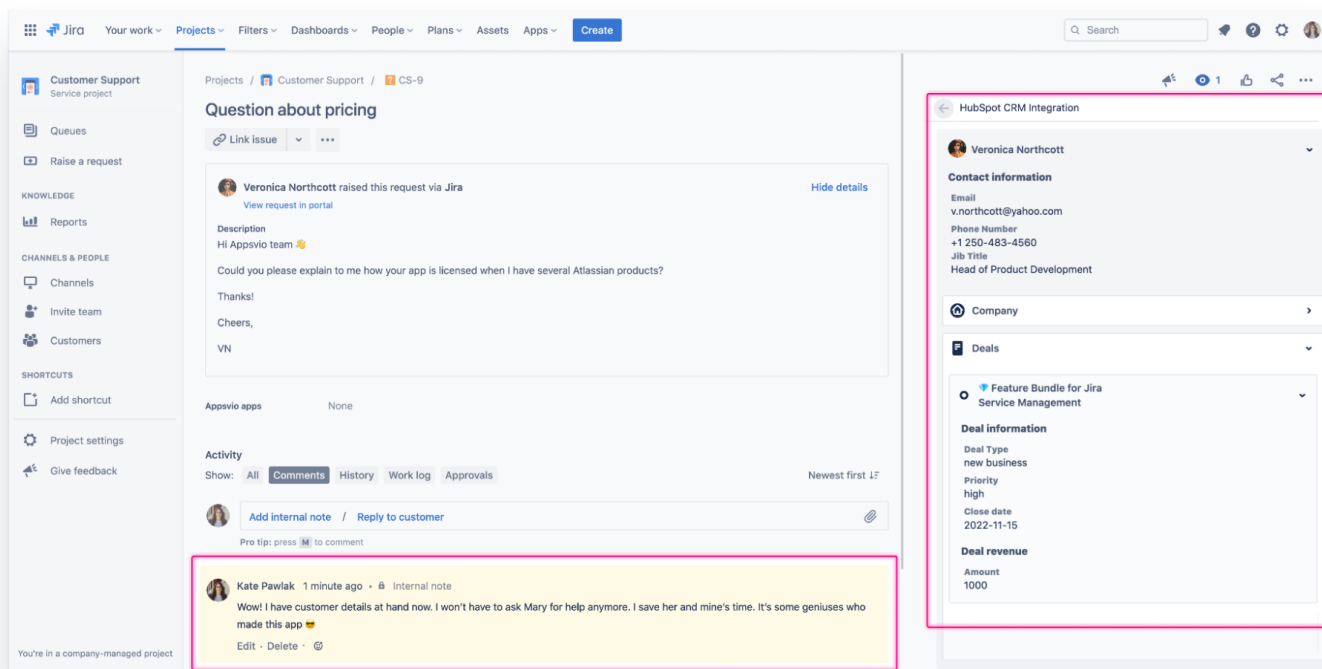
- Mary: "Hi Mary"
- Kate: "Hello"
- Kate: "Could you please check which product Veronica Northcott uses? Her email address is: v.northcott@yahoo.com"
- Mary: "I don't have access to our CRM"
- Kate: "I can do everything for you. I'll check out HubSpot. Give me a sec."
- Mary: "Sorry it took so long, but I forgot my HubSpot login details. Veronica uses the Feature Bundle app."
- Kate: "Thank you very much! Sorry to keep bothering you with my questions about customers"
- Mary: "No problem, always at your service. It would be easier if there was some integration between HubSpot and Jira ..."

Now, if a HubSpot Jira integration was in place, Kate could still have the data she needed without needing a HubSpot access.

And the whole process would have been much faster and less time-consuming for others.

Speeding up the ticket service means customer satisfaction and eventually reduces the costs, too.

With a HubSpot Jira integration, Kate could do it on her own and answer the customer faster without involving other teams.



The screenshot displays the Jira interface for a 'Customer Support' project. The main content area shows a ticket titled 'Question about pricing' raised by Veronica Northcott. The ticket description asks for an explanation of app licensing. A comment from Kate Pawlak, dated 1 minute ago, is highlighted with a pink box and contains the text: 'Wow! I have customer details at hand now. I won't have to ask Mary for help anymore. I save her and mine's time. It's some geniuses who made this app'. To the right, a 'HubSpot CRM Integration' sidebar is also highlighted with a pink box, showing contact information for Veronica Northcott (Email: v.northcott@yahoo.com, Phone Number: +1 250-483-4560, Jib Title: Head of Product Development) and deal information for a 'Feature Bundle for Jira Service Management' (Deal Type: new business, Priority: high, Close date: 2022-11-15, Deal revenue: Amount 1000).

Conclusion

HubSpot CRM allows you to handle an unlimited amount of users and data and guarantees effective activity management within the marketing and sales teams. Jira on the other hand is the go-to tool for many developers and engineering teams.

So in this article, we discussed why we need to integrate these 2 systems and how a HubSpot Jira integration can make collaboration much smoother between different teams without them needing to leave their environment. The teams no longer need to manually copy and paste data from one platform to another.

If you have any questions about the app used in this article, you can [reach out to the vendor](#) or [book a demo](#) with them.

Recommended Reads:

- [Jira Salesforce Integration: How to Set up a Two-Way Sync between Different Teams](#)
- [Jira Zendesk Integration: The Step-by-Step Guide](#)
- [Jira to Jira Integration: The Comprehensive Guide to Jira Sync](#)
- [Jira Azure DevOps Integration: The Complete Guide](#)